

TMJ WEEKLY STAFFING

INTELLIGENCE BRIEF

Volume 1 • Issue 10

Industry Trends, Market Intelligence, Communication Insights

September 30, 2026

WHY YOUR ENTIRE COMPANY IS A MARKETING DEPARTMENT

"Marketing is not a department. It is the cumulative experience of every interaction your company has with another human being."—**Robert Woodford, Founding Director, The Marketing Junction**

Most companies think of marketing as the part of the business responsible for attracting attention, generating leads, building the brand and helping sales create new customers. Once the prospect becomes a customer, marketing gradually disappears from the picture and responsibility moves to operations, customer service, accounting, recruiting or some other department. That may be the way companies organize themselves internally, but it is not the way customers experience them.

Customers experience one company.

Consider what happens when a company has done everything right to win a new customer. Marketing creates the campaign, sales develops the relationship, the website reinforces the brand and the salesperson gets the contract signed. Then, three weeks later, the customer receives a rude or dismissive message from accounting because an invoice is a few days overdue. The customer does not think, "Accounting was disappointing, but fortunately the Marketing Department is excellent." They think, "These people are difficult to deal with."

That is marketing.

The same principle applies throughout the organization. A recruiter who treats a candidate carelessly is marketing the company negatively. A customer-service representative who goes out of their way to solve a problem is marketing it positively. A sales representative who fails to return a call is marketing the company, and so is an executive whose communication consistently demonstrates professionalism and respect.

The principle also applies internally.

A company can tell its employees that it values respect, collaboration, professionalism, and accountability, but those words mean very little if everyday behavior communicates something different. Employees learn what a company actually values from the way decisions are made, problems are handled, and people are treated. They carry that experience into their interactions with customers, candidates, and colleagues.

This is why marketing should not be viewed simply as a function that produces campaigns.

Marketing is every email, phone call, proposal, invoice, recruiting conversation, customer-service interaction, job advertisement, and LinkedIn message through which someone experiences the organization. Some of those communications are carefully designed by marketing professionals. Most are not. All can strengthen or damage the reputation marketing is trying to build.

That creates a larger responsibility for the modern marketing function. Its job is not simply to help a company say the right things when it wants to win business. Marketing can also help the organization understand what its communications and behavior collectively tell people about the company.

A logo, website or campaign can express a brand. They cannot rescue an organization whose everyday behavior contradicts it. If the advertising says, "We care about our customers," while customers are treated like an inconvenience, they will believe the experience.

Marketing does not end when the sale is made.

The sale may be when the company finally gets the opportunity to prove whether its marketing was telling the truth.

Every communication is a brand experience.
The question is: **What is your company communicating?**

Having said that, here are the things you should care most about this week if you want to stay ahead of the competition.

Executive Snapshot

The U.S. staffing market remains materially stronger than a year ago. For the week ending September 12, staffing hours were up 11% year over year, while commercial staffing was up 14%, according to the SIA/Bullhorn Staffing Indicator.

Workers are also staying with employers longer. New Bureau of Labor Statistics data show median tenure among wage and salary workers reached 4.1 years in January 2026, up from 3.9 years in January 2024. The share with one year or less of tenure declined from 22.2% to 20.6%.

The UK is showing tentative improvement. Permanent placements increased in August for the first time since September 2022, while temporary billings rose for a fifth consecutive month. Vacancies continued to decline and candidate availability increased, however, leaving the recovery uneven.

Across the EU, the employment rate for people aged 20 to 64 reached 76.4% in the second quarter, up from 76.3% in the first, while labor market slack remained at 11.0%.

The common signal is selectivity. Hiring demand is improving in parts of the market, but the recovery is not broad enough to treat every geography, occupation or customer segment alike.

Labor Economist's Market Watch

United States

The U.S. labor market continues to show remarkably little evidence of widespread layoffs. Initial unemployment claims fell by 1,000 to 197,000 in the week ending September 19, below economists' expectations of 201,000 and near their lowest level since mid-July. The figures suggest employers remain reluctant to cut workers even as the broader hiring picture has fluctuated considerably this year.

More striking evidence of economic strength came from S&P Global's September flash PMI. The composite index jumped from 56.0 to 58.4, its highest level since July 2021, while employment increased at the fastest pace in more than four years. Business input costs also rose at nearly a four-year high, driven partly by higher fuel and transportation costs. Stronger activity, faster hiring and persistent price pressure strengthen the case for further monetary tightening.

Financial markets are already reflecting that concern. The Federal Reserve raised its target rate to 3.75%–4.00% on September 16, while the 10-year Treasury yield subsequently climbed above 5%, reaching its highest level since 2007. The OECD now projects one additional Fed increase during the fourth quarter, followed by rates remaining at 4.00%–4.25% through 2027 as inflation pressures persist.

Labor supply adds another complication. BCA Research argues that the net departure of unauthorized immigrants has reduced labor supply, lowering the amount of job growth needed to tighten the labor market further. BCA finds little evidence that this shift is materially increasing inflation today, but warns that stronger labor demand could become inflationary more quickly when fewer workers are available.

That makes Friday's September employment report particularly important. Economists currently expect roughly 100,000 new jobs, but payroll growth alone will not tell the entire story. Wage growth, unemployment and labor-force participation will help determine whether September's stronger business surveys represent sustainable hiring growth or another source of inflation pressure.

For staffing leaders, the important signal is not simply that the labor market is strong. Employers may increasingly be competing within a labor pool that is growing more slowly. If demand continues to strengthen while labor supply remains constrained, recruiting difficulty could increase even without the rapid job creation seen earlier in the cycle.

United Kingdom

UK hiring demand showed tentative signs of improvement in August, although the recovery remains uneven. The Recruitment and Employment Confederation counted nearly 1.7 million active job postings, up 1.8% from July and 10.4% from a year ago. New postings fell 1.9% to approximately 713,000 for their second consecutive monthly decline, although they remained 3.6% higher than a year ago.

Demand is particularly strong in several manual and mid-skilled occupations. Active postings for delivery drivers and couriers increased 91.8% between July and August, crane drivers rose 42.9%, and plasterers increased 40.7%. Carpenters and joiners, warehouse workers, large goods vehicle drivers, and several other skilled and operational roles also recorded increases, while recruitment remained more volatile in sectors including finance and retail.

The supply side is shifting as well. The employment rate among people aged 50 to 64 reached 72.2% in 2026, its fourth consecutive annual increase, although the Department for Work and Pensions cautions that the latest increase is not statistically significant. Women are now leaving the labor market at an average age of 63.1, the highest recorded level. Illness or disability remains the leading reason for economic inactivity among people aged 50 to 64, and approximately 866,000 people in that age group are either seeking work or would like to work.

Military investment provides another concentrated source of employment demand. Ministry of Defence spending with UK industry reached a record £34.1 billion in 2025/26, up 3.2% after inflation. The latest employment estimates show that MOD spending supported approximately 274,000 direct and indirect jobs in 2024/25, an increase of 26,000 from the previous year.

The broader outlook remains complicated by inflation and interest rates. Bank of England Deputy Governor Clare Lombardelli warned last week that rates will likely need to rise if elevated energy prices persist, unless clearer evidence emerges that economic activity is weakening.

For staffing leaders, the UK opportunity is increasingly concentrated by occupation and industry. Logistics, construction, skilled operational work and military activity are producing demand, but falling new postings and persistent economic inactivity show that the broader labor market has not normalized.

Europe

Euro-area business activity accelerated sharply in September. The flash composite PMI rose from 52.0 to 53.1, its highest level in more than three years and well above expectations for a decline to 51.7. New orders increased at their fastest pace in more than four years, prompting firms to add workers at a stronger rate to meet rising demand.

The improvement came with renewed price pressure. Businesses reported higher input costs and passed some of those increases on to customers. Economists at Capital Economics noted, however, that there is still little evidence that higher energy costs are feeding into wages, an important distinction for European Central Bank policymakers watching for broader inflation effects.

The stronger data complicate the interest-rate outlook. The ECB raised its deposit rate to 2.50% earlier this month, and markets are pricing the possibility of additional increases. ECB Governing Council member Martin Kocher has argued that the economy has proved more resilient than expected and can withstand further tightening.

Growth also broadened across the bloc's largest economies. German business activity expanded solidly in September, while France recorded its strongest growth in more than two years as services rebounded. The improvement suggests that economic momentum is becoming less dependent on a narrow group of countries and industries.

Germany nevertheless faces a longer-term challenge in manufacturing. ECB analysis finds that China's expansion into higher-value manufacturing is increasing competitive pressure on European producers, with Germany particularly exposed because of the importance of manufacturing to its economy and its historical reliance on Chinese demand. The pressure creates a structural risk to future industrial investment and employment even as the broader economy improves.

For staffing leaders, Europe is showing broader labor demand, but the recovery remains vulnerable to higher costs, tighter monetary policy and structural pressure on manufacturing.

Global

The global economy is proving more resilient to this year's energy and geopolitical shocks than many economists initially expected, although much of that resilience is concentrated.

New Brookings research suggests that the U.S. economy's exposure to oil shocks has changed significantly since the shale boom transformed the country from a net petroleum importer into a net exporter. Historically, higher oil prices benefited producing regions while damaging employment elsewhere. Researchers now find that oil-price shocks have produced similar employment gains outside mining in both oil-producing and non-producing states.

The research does not examine this year's Middle East shock, but it suggests the U.S. labor market may be less vulnerable to higher oil prices through the traditional employment channel than it was in previous decades.

Artificial intelligence investment is providing another source of support. The OECD expects the U.S. economy to grow 2.2% this year, with strong AI-related investment helping offset pressure from higher energy prices and geopolitical uncertainty. The concentration of that investment raises a different question: how broadly will the benefits spread across industries and labor markets?

Global sentiment has also improved. The World Economic Forum reports that 56% of surveyed chief economists expect the global outlook to remain stable or improve over the coming year, a sharp change from May, when 89% expected conditions to weaken.

Financing remains a major constraint. Long-term borrowing costs in many advanced economies are at their highest levels in at least 15 years amid fiscal concerns and heavy bond issuance by AI firms. The OECD recently trimmed its 2027 global growth forecast by 0.1 percentage point as higher energy prices, tighter financial conditions and geopolitical uncertainty weigh on the outlook.

For staffing leaders, the global picture is one of resilience increasingly shaped by where capital is flowing. AI investment is spurring growth and the U.S. appears better positioned to absorb oil shocks than it was historically, but the employment benefits may remain concentrated unless that investment spreads more broadly through the economy.

U.S. Hiring Demand Tracker

Online hiring demand remained broadly stable in the latest weekly data. The seasonally adjusted Indeed U.S. Job Postings Index increased from 103.15 on September 11 to 103.45 on September 18, a week-over-week increase of approximately 0.3%. Overall posting activity remains above its February 2020 pre-pandemic baseline.

New job postings moved sharply in the opposite direction, declining from 96.81 to 94.02, a decrease of approximately 2.9%. The widening gap between overall postings and newly added jobs shows that the stock of available postings remained relatively stable even as the flow of newly posted opportunities weakened.

Regional Read

Northeast

New York | Pennsylvania | New Jersey

All three states remain below their February 2020 posting baseline, leaving the Northeast region among the weaker areas of the national hiring market despite recent week-to-week improvement.

South

Texas | Florida | North Carolina

The South continues to stand out for the strength of its overall posting levels. All three states remain above their February 2020 baseline, giving the Southern region the strongest hiring-demand profile among the four regional baskets.

Midwest

Illinois | Michigan | Missouri

Conditions remain mixed. Michigan and Missouri are above their February 2020 baselines, while Illinois remains below.

West

California | Oregon | Arizona

The West is similarly uneven. California and Oregon remain below baseline, while Arizona remains above it.

Industry Hiring Demand

Industry data show considerably more variation than the national headline.

Demand remains elevated across several technical and operational categories. Electrical engineering stands at 146.65, nearly 47% above its February 2020 baseline. Construction is at 125.14, production and manufacturing at 122.73, logistics support at 121.52, industrial engineering at 120.15, and project management at 116.83.

Several commercial and consumer-facing categories remain below baseline. Human resources stands at 96.23, food preparation and service at 94.78, sales at 92.99, retail at 88.68, customer service at 87.90, scientific research and development at 82.61, and marketing at 75.90.

What It Means

The national market is stable, but increasingly selective. Overall postings increased approximately 0.3% while new postings declined 2.9%.

The divergence is visible by both industry and geography. Engineering, construction, manufacturing and logistics remain comparatively strong, while several office-facing, commercial and consumer-facing functions remain below their pre-pandemic baselines. The South continues to show stronger posting levels relative to baseline, while the Northeast and much of the West remain softer.

For staffing firms, opportunity is becoming more concentrated. The next signal to watch is whether new postings rebound while overall demand remains above baseline, which would provide stronger evidence that employers are expanding hiring activity.

Staffing Industry Implications

1. THE BRAND PROMISE HAS TO SURVIVE CONTACT WITH THE COMPANY

Marketing can create the promise. The organization has to deliver it.

If a staffing firm says it is responsive, customers should experience responsiveness. If it claims to understand staffing operations, recruiters and account managers should demonstrate that understanding. If it promises to make clients' lives easier, billing and administration cannot make them harder.

Forrester's Total Experience research connects brand experience, customer experience and employee experience across the customer lifecycle. The principle is straightforward: what a company promises and what people experience cannot be managed as separate things.

2. "BACK-OFFICE" DOES NOT MEAN INVISIBLE

An invoice, renewal notice, scheduling problem, collections email or request for missing information is still a customer interaction.

Companies often divide activity into customer-facing and back-office functions. Customers do not. The standard for communication should therefore follow the customer journey, not the organizational chart.

3. INTERNAL COMMUNICATION EVENTUALLY REACHES THE CUSTOMER

Gallup reports that global employee engagement fell to 20% in 2025 and that managers account for at least 70% of the variance in team engagement.

Leadership communication therefore has consequences beyond employee morale. Managers influence the people who eventually represent the company to customers, candidates and one another.

Internal communication is upstream of customer experience.

4. AUDIT THE JOURNEY, NOT JUST THE MARKETING

A traditional brand audit examines advertising, websites, campaigns and collateral.

A more useful audit follows people.

Follow a prospect from first contact through sales. Follow a customer through delivery, billing, renewal and expansion. Follow a candidate through application, interview, placement and onboarding. Follow an employee through recruitment, management and departure.

Then examine what the company communicates at each point.

That is where the brand is actually experienced.

What We're Seeing In The Market

Communication is becoming more distributed, while companies are trying to make their brands more consistent.

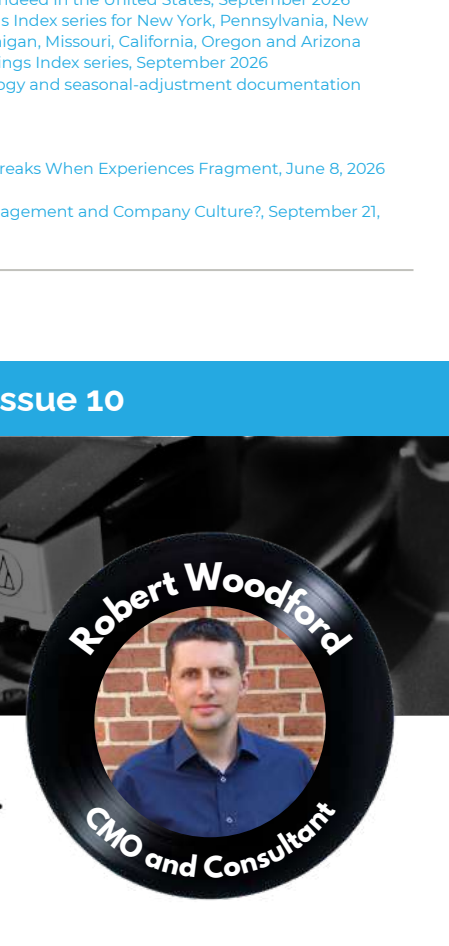
Marketing owns some interactions. Sales owns others. Recruiting, operations, finance and customer service own many more. Automated systems increasingly communicate on the company's behalf as well.

That creates a new brand-management problem: a company can look highly polished before the sale and sound like several different organizations afterward.

The customer journey is therefore becoming a chain of confusing forms creates friction. A thoughtful follow-up reinforces trust. A dismissive email weakens it.

Individually, these moments look small.

Collectively, they are the brand.



MESSAGING TREND OF THE WEEK

FROM BRAND PROMISE TO BRAND BEHAVIOR

Marketing has traditionally concentrated on the promise:

- What do we stand for?
- What makes us different?
- Why should customers choose us?

Those questions still matter, but they are incomplete.

The next question is:

What does the company actually do that proves the promise is true?

Forrester's Total Experience work connects the promise a brand makes with the customer experience that follows and the workforce's ability to deliver it.

For staffing firms, that creates a practical test.

Don't simply say you're responsive. Look at response times.

Don't simply say you value candidates. Examine what happens when the answer is no.

Don't simply say you are a strategic partner. Examine what happens when the customer has a problem.

Don't simply say you value employees. Look at how managers communicate with them.

The message is not only what the company says.

It is what the company repeatedly does.

EXECUTIVE INSIGHT

Marketing may have been defined too narrowly.

Companies do not communicate with abstract "markets." They communicate with people, and those people move between roles. A candidate can become an employee. An employee can become a customer. A customer can become a referral source. A former employee can become a buyer.

Reputation is therefore being built continuously, whether the marketing department is involved or not.

That gives marketing a larger strategic role: helping the organization understand not only how it is advertised, but how it is experienced.

Diagnostic Question Of The Week

If we collected 25 random communications from every department in your company, removed the department names and showed them to a stranger, would that person know they came from the same company?

Look at the language, tone, professionalism and respect. Look at how problems are handled and requests are made.

Then ask:

Does the way your company actually communicates support the brand you are spending money to market?

If not, the problem may be bigger than marketing.

You may have a company-wide communication problem that marketing has been asked to disguise.



Research Sources & References

United States Staffing and Labor Market

- Staffing Industry Analysts / Bullhorn, SIA/Bullhorn Staffing Indicator, September 22, 2026
- U.S. Bureau of Labor Statistics, Employee Tenure in 2026, September 24, 2026
- U.S. Department of Labor, weekly unemployment insurance claims, September 2026
- S&P Global Market Intelligence, US Flash PMI Signals Fastest Growth for Over Five Years in September, September 23, 2026
- Board of Governors of the Federal Reserve System, Federal Reserve Issues FOMC Statement, September 16, 2026
- Federal Reserve, H.15 Selected Interest Rates, September 2026
- BCA Research, The US Immigration Crackdown: Another Inflation Shock in the Making?, September 2026

United Kingdom Labor Market

- KPMG/Recruitment and Employment Confederation, UK Report on Jobs, September 2026
- Recruitment and Employment Confederation, Labour Market Tracker: Active Job Postings Rise 10% Year-on-Year in August, September 21, 2026
- UK Department for Work and Pensions, Economic Labour Market Status of Individuals Aged 50 and Over, Trends Over Time, September 2026, September 24, 2026
- UK Ministry of Industry, Regional Expenditure with UK Industry 2025/26, September 24, 2026
- UK Ministry of Defence, MOD Regional Expenditure Statistics with Industry, 2025/26 release
- Bank of England, September 2026 Monetary Policy Summary and Minutes
- Bank of England, Clare Lombardelli, remarks on the inflation and monetary-policy outlook, September 2026

European Labor Market and Economy

- Eurostat, Employment Rate Up in Q2 2026, September 11, 2026
- Eurostat, second-quarter 2026 GDP and employment data
- S&P Global Market Intelligence, Eurozone Growth Hits Highest Since April 2023 According to Flash PMI, September 23, 2026
- European Central Bank, September 2026 monetary-policy materials
- European Central Bank, Which Countries are the Most Vulnerable to the 'Industrial Rise of China'? Mapping Europe's Uneven Exposure, Economic Bulletin, Issue 6/2026
- Capital Economics, analysis of September 2026 euro-area PMI and inflation pressures

Global Economy

- Brookings Papers on Economic Activity, Diego Känzig, James H. Stock and Luca Zanotti, From Importer to Exporter? Oil Shocks and the U.S. Economy, September 23, 2026
- OECD, Economic Outlook, Interim Report September 2026
- World Economic Forum, Chief Economists' Outlook, September 2026, September 22, 2026

U.S. Hiring Demand Tracker

- Indeed Hiring Lab / Federal Reserve Bank of St. Louis FRED, Job Postings on Indeed in the United States, September 2026
- Indeed Hiring Lab / FRED, New Job Postings on Indeed in the United States, September 2026
- Indeed Hiring Lab / FRED, state-level Job Postings Index series for New York, Pennsylvania, New Jersey, Texas, Florida, North Carolina, Illinois, Michigan, Missouri, California, Oregon and Arizona
- Indeed Hiring Lab / FRED, occupational Job Postings Index series, September 2026
- Indeed Hiring Lab, Job Postings Index methodology and seasonal-adjustment documentation

Brand, Customer and Employee Experience

- Forrester, Total Experience Score
- Forrester, Total Experience Score, 2026: Growth Breaks When Experiences Fragment, June 8, 2026
- Forrester, Total Experience Methodology
- Gallup, How Can Leaders Improve Employee Engagement and Company Culture?, September 21, 2026

THE MARKETING JUNCTION
Weekly Staffing Intelligence Brief

End of Issue 10

Let's Change The Record.





Robert Woodford

CMO and Consultant